



QUICK REFERENCE GUIDE:

Change Orders – Adding Funding

Background:

When an item added by Change Order has a different funding source, but the Program code (Project ID) remains the same only a new fund package needs to be added. When the new funding has a different Program code, both a new fund package and new Project need to be added. In order to select the correct funding package and project when adding the new item to the change order, the following must be completed beforehand.

Roles:

Construction Funding User

Navigation:

Adding a Fund Package

Contract Administration > Contract > Funding Tab

1. Click the **Select Fund Package** button and use the search field to find and select the correct Fund Package. Once selected, press **Add Fund Package**.
2. Click the **Fund** link for the newly added Fund Package. Enter the Project ID at the end of the **Fund Package Description** and press **Save**.
3. Click the **Select Funds** button and use the search field to find and select all funds to be added to the Fund Package.
 - a. If there is Federal and matching funding, make sure to add the Federal Fund Package and the associated matching Fund Package (i.e. if the federal fund was 05-4R the State fund that should be used would be 05-4R-SOA), or other local match.
4. Expand the first fund, enter a **Priority** of 1* and the **Percentage** (if there are two funds in the fund package with the same priority the Percentages must equal 100).

5. Enter the **Template, Object, Phase Code** and **Activity Code** and repeat steps 4 and 5 for the any other funds (if it is simply Federal funding, and state match, they should have the same coding). Click **Save**.
6. If the Program code/Project is one that already exist on the Contract you are finished.

* If the funding being added is limited (capped at a certain dollar amount) enter that funding with a priority of 1 and the Amount Encumbered as well as funds with a priority 2 for any funding over that Amount Encumbered.

Adding a Project

Contract Administration > Project Quick Link

1. From the Contract Project Overview, click the **Component Actions Menu** and press **Add**.
2. Populate the **Project ID** (with the Project Number), **Project Item List, Unit System** (English), **Project Description** (Project Name) and if applicable the **Federal Project Number** and **State Project Number** and click **Save**.
3. Select the **Categories** tab, press **New** and enter the **Category ID**, and the **Category Description** (the standard entry is 00BB and Basic Bid) and click the **Combine Like Categories** box and click **Save**.
4. Click the **Regions** tab, enter the **Region ID**, click the **Primary** box, if applicable, and the **Maintenance District**, if known. Click **Save**.

Next Steps:

Make sure to select the newly added Project and Fund package when adding the new item on your change order.

If you need further assistance please contact your Module Admin
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